



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**December 16, 2019**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals  
FY 2019 annual targets  
FY 2019 actuals  
FY 2019 actuals as a percentage of annual targets  
FY 2019 actuals as a percentage of FY 2018 actuals  
FY 2020 actuals to date  
FY 2020 annual targets  
FY 2020 actuals as a percentage of FY 2020 annual targets

**The general target is 41.66% for FY 2020, July 1, 2019-November 30, 2020**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- DPHHS continues to work through data entry and reporting problems with the new state database system. Until the problems are fully resolved, data on the following performance measures/workload indicators may be incomplete:
  - Amount of Client Savings from Benefits Counseling
  - Number of Outreach, Information, Referral Contacts
  - Benefits Counseling Savings and Hours of Service
- **Nutrition**
  - We have increased outreach for the MOW program as we have the capacity to serve additional participants and are now outpacing the target for the year.
- **Transportation**
  - After school program ridership is down from this time last year due to the elimination of the Kalispell City Parks and Rec rides. However, increased ridership on the Kalispell Green, Red and Orange city bus lines continues to hold steady, putting us on pace with total ridership from FY 2019.
  - Ridership on the fixed and commuter routes continue to substantially exceed the target. Paratransit ridership continues to be under target due in part to the changes in fixed route service in Kalispell that make it easier for DAR passengers to ride the fixed route.
  - We are experiencing a sharp increase in trip denials for paratransit, from none in October to 41 in November. While some of the increase is likely due to a change in how we determine

what qualifies as a trip denial, we believe some of the increase is the result of the ASSIST Program discontinuing medical rides for Kalispell area patients who live in the paratransit service area. We are monitoring the situation and looking at options for redirecting resources to the paratransit service. See Independent Living Services section for more information.

▪ **Information and Referral/Assistance**

- Outreach/Education efforts continue to target Medicare beneficiaries, both related to Open Enrollment and BenefitsCheckUps to connect them with additional benefits.

▪ **Independent Living Services**

- The total “units of service” for all services combined continue to be substantially below target due to industry-wide paid caregiver shortages. We are working internally and with our home care provider agencies to develop other strategies. One of the options we plan to move forward with is using Escorted Transportation funds to pay for door-to-door Eagle Transit service for older adults to travel around and between Kalispell and the communities of Whitefish, Columbia Falls, Bigfork and possibly Lakeside. We’ve received tentative approval from DPHHS and hope to begin service in January.

▪ **Benefits Counseling**

- The increase in cost savings for clients and hours of service provided coincides with Medicare Open Enrollment.

▪ **Ombudsman**

- The program continues to undergo major restructuring at the state level and it is unclear how it will operate in the future.

**AOA Administration**

***Budget and Contracts***

- We received the new BEC grant from the National Council on Aging (NCOA) which we submitted in October in partnership with the Area VI Agency on Aging. The grant will cover 9 months beginning January 1, 2020 for a total of \$26,250.

***Building***

- Nothing to report.

***HR/Staff Development***

- Nothing to report.

**State/Federal/Legislative Issues**

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa will not be able to attend the quarterly meeting in Helena in January.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
  - Legislatively n4a is focused on reauthorization of the Older Americans Act which expired at the end of September.
  - The House unanimously approved a bipartisan bill to reauthorize the Act on October 28, 2019. It is waiting to be taken up by the Senate.

### **AOA Advisory Council**

- Commissioners reappointed two council members to new terms.
- We have 12 vacancies on the Council (17 positions total), so member recruitment and development will be a priority in the new year.

### **Outreach/Education/Media/Events**

Note: Transportation related outreach is noted in the Eagle Transit section below.

11/2/2019: presentation to Presbyterian Men's Group, 12

11/4/2019: KGEZ monthly interview, 15,000

11/5-11/2019: DIL Daybook, AOA Advisory Council meeting, 52,500

11/18-11/21/2019: DIL Daybook, Medicare 101 class, 70,000

11/21/2019: Medicare 101 Class, 8

11/21/2019: presentation on aging issues at Immanuel Lutheran Gala, 80

11/22-25/2019: DIL Daybook, Senior Info Fair in Columbia Falls, 70,000

11/25/2019: Senior Info Fair in Columbia Falls, 15

11/25/2019: Presentation, "What's New in Medicare?", 15

11/23-26/2019: DIL Daybook, Medicare 101 class, 70,000

11/26/2019: Medicare 101, 5

11/26/2019: North Valley Senior Center Outreach/BEC, 7

August, September, October, November BEC commercials on KGEZ: 48 ads per month, 60,000

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - Annual Transportation Coordination Plan/5311 Application/Capital Request
    - We received notice of our FY 2021 funding allocation from MDT:
      - \$785,141 in 5311 funds (up \$63,741 from FY 2020)
      - \$172,307 in TransADE funds (up \$29,711 from FY 2020)
    - Facilitated two public input meetings, 11/18 and 12/5
    - We have developed and will conduct a business owner survey shortly
  - Quarterly/annual reporting
    - We completed initial entries for FY 2019 into the National Transit Database (NTD) in mid-October. NTD is requesting additional clarification for some of our entries, which are due to MDT for review on 12/20.
  - 5-Year Transportation Development Planning Grant
    - After discussions with Glacier National Park/NPS failed to resolve our issues and concerns regarding the Cooperative Agreement (CA), Commissioners voted on 12/11/19 to terminate the agreement effective December 31<sup>st</sup>.
    - Prior to the termination vote, we continued to meet with community leaders and other stakeholders to gauge interest in and support for an integrated transit system serving Glacier National Park and the surrounding gateway communities. Since the last report:
      - On 11/20/2019, Lisa presented to the Whitefish Chamber of Commerce Board
- Outreach/Education/Media/Special Events:
  - To satisfy federal regulations, daily radio ads ran on KGEZ
  - See above for outreach related to the integrated transit system proposal since last month's report.
- Operations:
  - Nothing to report.

- Staff Development/Training:
  - Tom Schneider and Kristina Stone went to MDT New Manager training in Helena 11/20-21/2019.
- Transportation Advisory Committee (TAC)
  - Commissioners reappointed one member to a new term and appointed one new member.
  - The TAC will meet next on January 2, 2020 to provide input on the annual TCP and Capital Request.
- Glacier National Park
  - See above.

### **Nutrition**

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- Our annual Thanksgiving Meal was held on Friday November 22<sup>nd</sup>. We served 425 people (225 in the AOA dining room).
- Our annual Christmas meal will be served on Friday, December 20<sup>th</sup>. The menu includes Chicken Kiev, wild rice, steamed broccoli, croissants and cherry cheesecake.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- I&A/Benefits Counseling/BEC:
  - Medicare Open Enrollment ended December 7<sup>th</sup>.
  - We were awarded a new BEC grant that begins January 1, 2020.
- Veteran Directed HCBS Program:
  - We have a total of 34 vets enrolled.
- Independent Living Services:
  - Given the paid caregiver shortage, we continue to explore other options meet client needs.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lakeside Chapel resumed MOW and social dining services this month.
- The Kalispell Senior Center hosted a potluck on Thanksgiving Day; 28 members participated.



# December 2019 Report: Performance Measures Tables - November 2019 stats (FY 2020)

41.66%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	November	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	3	54	57	119	48%
# Receiving Meals on Wheels	374	465	401	86%	107%	32	299	331	465	71%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	133	939	1,072	1,200	89%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	8	208	216	450	48%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	\$244,399	\$92,050	\$336,449	\$400,000	84%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%	92%	88%	92%	88%	104%
Per Meal Cost of Nutrition Services	\$6.29	\$7.00	\$6.80	97%	108%	\$6.03	\$5.80	\$6.03	\$7.00	86%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	N/A		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	N/A		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	1	11	12	25	48%
WORKLOAD INDICATOR	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	November	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
<b>Nutrition</b>						November				
Total Meals	80,639	80,000	78,515	98%	97%	7,354	28,751	36,105	80,000	45%
MOW	47,409		46,658	N/A	N/A	4,705	17,234	21,939		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	2,649	11,517	14,166		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%	0	824	824	2,000	41%
<b>Transportation</b>						November				
Total Ride Count	99,104	90,000	116,017	129%	117%	7,868	41,341	49,209	100,000	49%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	1,659	7,866	9,525	30,000	32%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	6,209	33,475	39,684	70,000	57%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	4	24	28	25	112%
<b>Information and Referral/Assistance</b>						November				
Outreach, Information, Referral Contacts	19,429	18,000	26,014	145%	134%	1,990	7,285	9,275	18,000	52%
Outreach/Education/Media Efforts	116	120	129	108%	111%	16	36	52	120	43%
<b>Independent Living</b>			66%			November				24%
Homemaker Units of Service	2,005	1,324	1,433	108%	71%	145	552	697	2,000	35%
Escorted Transportation Units of Service	2,314	1,391	886	64%	38%	359	296	655	2,174	30%
Respite Units of Service	2,079	3,250	1,793	55%	86%	87	364	451	2,857	16%
Community Support/Senior Companion Units of Service	1,310	1,176	508	43%	39%	55	151	206	1,471	14%
Personal Care Units of Service	231	65	146	225%	63%	11	42	53	174	30%
<b>Benefits Counseling</b>						November				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	202	136	338	500	68%
<b>Ombudsman</b>						November				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	59	325	384	1,000	38%